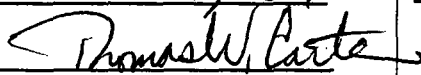
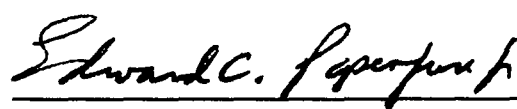


DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS RETENTION AND DISPOSAL SCHEDULE		Schedule No. <div style="text-align: right;">M-225</div> Page 1 of 3
Agency TOWN OF SOMERSET		Division/Unit ADMINISTRATION

Item No.	Description	Retention
1.	General Correspondence Original incoming letters, copies of outgoing letters, memoranda, studies, reports, directives, policies and other materials related to Town administration.	Screen annually and destroy the material that is no longer needed for current business. Retain permanently any material that serves to document the origin, development and accomplishments of the office. Transfer periodically to the Maryland State Archives.
2.	Personnel Files Personnel records for employees. Includes: medical records, injury reports, disciplinary actions, commendations, promotions, awards, leave records, etc.	Retain for three years after termination date, then destroy.
3.	Minutes of Town Council Meetings	Permanent. Transfer periodically to State Archives.
4.	Minutes of Appointed Committees	Retain for three years, then destroy unless of historical value. Retain historical information permanently and transfer periodically to State Archives.

Schedule Approved by Department, Agency, or Division Representative Date <u>Oct. 26, 2006</u> Signature <u></u> Typed Name <u>Thomas W. Carter</u> Title <u>Clerk-Treasurer</u>	Schedule Authorized by State Archivist Date <u>23 Jan 07</u> Signature <u></u>
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DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS RETENTION AND DISPOSAL SCHEDULE (Continuation Sheet)		Schedule No. M-225
		Page 2 of 3
Agency TOWN OF SOMERSET		Division/Unit ADMINISTRATION
Item No.	Description	Retention
5.	Deeds/Agreements Deeds of property and agreements between the Town and individuals/entities.	Permanent. Transfer periodically to the State Archives.
6.	Annexations Annexation Petitions with supporting and background documents.	Permanent. Transfer periodically to the State Archives.
7.	Deannexations Deannexation Petitions with supporting and background documents.	Permanent. Transfer periodically to the State Archives.
8.	Legislation Charter, charter amendments, ordinances, and resolutions adopted by the Council with supporting and background documents, if any.	Permanent. Transfer periodically to the State Archives.
9.	Town Code and Amendments The Code, with amendments, contains the current local laws of the Town.	Permanent. Transfer periodically to the State Archives.
10.	Legal Opinions and Litigation. Written opinions rendered by the Town Attorney at the request of the Mayor and litigation cases involving the Town.	Permanent. Transfer periodically to the State Archives.
11.	Town Publications Town Journal, handbook, directories and various notices to the press and general public regarding current events.	Screen annually and destroy the material that is no longer needed for historical purposes. Retain historical information permanently and transfer periodically to State Archives.

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation Sheet)**

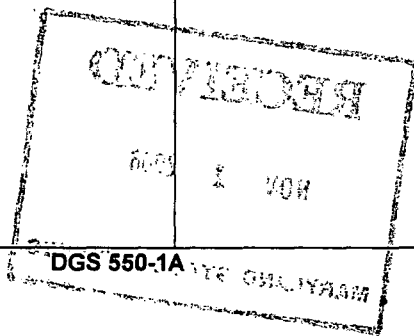
Schedule No. M-225

Page 3 of 3

Agency
TOWN OF SOMERSET

Division/Unit
ADMINISTRATION

Item No.	Description	Retention
12.	Building Permits/ Plans for residents and Town facilities.	Permanent. Transfer periodically to the State Archives.
13.	Requests for Quotations/ Invitations to Bid This series contains the bid specifications, drawings, advertisement and other associated documents.	Retain in office for five years after contract completion or until audit requirements have been met, then destroy.
14.	Insurance (Property, Vehicle and Health) Documentation and correspondence relating to insurance for property, vehicle and health coverage.	Screen annually and destroy material having no further legal, administrative, fiscal or operational value.
15.	Insurance (Workers' Compensation) Workers' Compensation Claims: contains incident reports, correspondence, medical reports, invoices and medical authorization forms.	Retain until termination plus three years, then destroy.



Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 1 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title

General Correspondence

5. Earliest Year/Latest Year

1906 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Original incoming letters, copies of outgoing letters, memoranda, studies, reports, directives, policies and other materials related to Town Administration.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☒ Alphabetical
☐ Numerical
☐ Chronological
☐ Geographical
☐ Other (specify) _____

9. Volume

24 cubic
feet
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

24 cubic
feet
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

- ☒ Daily ☐ Weekly ☐ Monthly

12. File Becomes Inactive After

1 ☐ Month(s) ☒ Year(s)
Number

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere?
(If yes, specify agency or office)

- ☐ Yes ☒ No

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements

- ☒ None ☐ State ☐ Federal ☐ Independent

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

18. Recommended Retention

Screen annually and destroy the material that is no longer needed for current business. Retain permanently any material that serves to document the origin, development and accomplishments of the office. Transfer periodically to the Maryland State Archives.

19. Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

21. Date

October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD PO BOX 275 JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY PAGE <u>2</u> OF <u>15</u>
Department/Agency Town of Somerset	2. Division Administration	3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title Personnel Files	5. Earliest Year/Latest Year 1985 to 2006
---	---

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.)

Personnel Files

Personnel records for employees. Includes: medical records, injury reports, disciplinary actions, commendations, promotions, awards, leave records, etc.

Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____	8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____	9. Volume <u>150</u> Cu. Ft. Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) [Computer Tape(s) [Other (specify) [10. Annual Accumulation <u>102</u> Cu. Ft. Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) [Computer Tape(s) [Other (specify) [
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11. File is Used <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File Becomes Inactive After <u>5</u> <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s) Number
13. Current Location(s) (Bldg., Floor, Room) Town Hall	14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite Law(s) & Regulations(s))	16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent
17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention Retain for three years after termination date, then destroy.

19. Name and Title of Preparer Thomas W. Carter, Clerk-Treasurer	20. Telephone number 301-657-3211	21. Date October 26, 2006
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<p>Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)</p>	<p>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD PO BOX 275 JESSUP, MARYLAND 20794</p>	<p>AGENCY RECORDS INVENTORY</p> <p>PAGE <u>3</u> OF <u>15</u></p>
<p>Department/Agency Town of Somerset</p>	<p>2. Division Administration</p>	<p>3. Unit</p>
<p>DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.</p>		
<p>Record Series title Minutes of Town Council Meetings</p>	<p>5. Earliest Year/Latest Year 1906 to 2006</p>	
<p>Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.)</p> <p>Minutes of Town Council Meetings, Agendas [Open and Closed Meetings].</p>		
<p>Record Series Format(s)</p> <p><input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm</p> <p><input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape</p> <p><input checked="" type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk</p> <p><input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape</p> <p><input type="checkbox"/> Other (specify) _____</p>	<p>8. Record Series Sequence</p> <p><input type="checkbox"/> Alphabetical</p> <p><input type="checkbox"/> Numerical</p> <p><input checked="" type="checkbox"/> Chronological</p> <p><input type="checkbox"/> Geographical</p> <p><input type="checkbox"/> Other (specify) _____</p>	<p>9. Volume</p> <p>11 cu. ft.</p> <p>Number</p> <p>File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) [____] Computer Tape(s) [____] Other (specify) [____]</p>
<p>10. Annual Accumulation</p> <p>11 cu. ft.</p> <p>Number</p> <p>File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) [____] Computer Tape(s) [____] Other (specify) [____]</p>		
<p>11. File is Used</p> <p><input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly</p>	<p>12. File Becomes Inactive After</p> <p>5 <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)</p> <p>Number</p>	
<p>13. Current Location(s) (Bldg., Floor, Room)</p> <p>Town Hall</p>	<p>14. Is Record Series Duplicated Elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(If yes, specify agency or office)</p>	
<p>15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(If yes, cite Law(s) & Regulations(s))</p>	<p>16. Audit Requirements</p> <p><input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent</p>	
<p>17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>18. Recommended Retention</p> <p>Permanent. Transfer periodically to State Archives.</p>	
<p>19. Name and Title of Preparer</p> <p>Thomas W. Carter, Clerk-Treasurer</p>	<p>20. Telephone number</p> <p>301-657-3211</p>	<p>21. Date</p> <p>October 26, 2006</p>

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 4 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title
Minutes of Appointed Committees

5. Earliest Year/Latest Year
1975 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.)

Minutes of Appointed Committees

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☒ Chronological
☐ Geographical
☐ Other (specify) _____

9. Volume

11 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

135 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

- ☐ Daily ☐ Weekly ☒ Monthly

12. File Becomes Inactive After

1 ☐ Month(s) ☒ Year(s)
Number

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere? ☐ Yes ☒ No
(If yes, specify agency or office)

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements ☒ None ☐ State ☐ Federal ☐ Independent

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

18. Recommended Retention
Retain for three years, then destroy unless of historical value. Retain historical information permanently and transfer periodically to State Archives.

19. Name and Title of Preparer
Thomas W. Carter, Clerk-Treasurer

20. Telephone number
301-657-3211

21. Date
October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD PO BOX 275 JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY PAGE <u>5</u> OF <u>15</u>
Department/Agency Town of Somerset	2. Division Administration	3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title Deeds/Agreements	5. Earliest Year/Latest Year 1964 to 2006
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Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Deeds of property and agreements between the Town and individuals/entities.

Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input checked="" type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____	9. Volume <u>136</u> cu. ft. Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/> 10. Annual Accumulation <u>1008</u> cu. ft. Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>
11. File is Used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly	12. File Becomes Inactive After <u>5</u> <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s) Number	
13. Current Location(s) (Bldg., Floor, Room) Town Hall	14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite Law(s) & Regulations(s))	16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention Permanent. Transfer periodically to the State Archives.	
19. Name and Title of Preparer Thomas W. Carter, Clerk-Treasurer	20. Telephone number 301-657-3211	21. Date October 26, 2006

Instructions - Type or Print a separate form for
a new or revised record series, forward with
Record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 6 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

INITIATION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title

Annexations

5. Earliest Year/Latest Year

1964 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.)

Annexation Petitions with supporting and background documents.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☒ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☒ Chronological
☐ Geographical
☐ Other (specify) _____

9. Volume

.02 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual
Accumulation

.0004 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

File is Used

- ☐ Daily ☐ Weekly ☒ Monthly

12. File Becomes Inactive After

5 ☐ Month(s) ☒ Year(s)
Number

Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere?
(If yes, specify agency or office)

☐ Yes ☒ No

Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements

- ☒ None ☐ State ☐ Federal ☐ Independent

Is an Index System Used? (If yes, explain briefly and describe any
hardware/software.)

☐ Yes ☒ No

18. Recommended Retention

Permanent. Transfer periodically to the State Archives.

Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

21. Date

October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with Record Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD PO BOX 275 JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY PAGE <u>7</u> OF <u>15</u>
	Department/Agency Town of Somerset	2. Division Administration

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title Deannexations	5. Earliest Year/Latest Year 1984 to 1988
--------------------------------------	--

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.)

Deannexations Petitions with supporting and background documents.

Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____		9. Volume <u>.04 cu. ft.</u> Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>	
				10. Annual Accumulation <u>.008 cu. ft.</u> Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>	
11. File is Used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly			12. File Becomes Inactive After <u>5</u> Number <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)		
13. Current Location(s) (Bldg., Floor, Room) Town Hall			14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
15. Access Restrictions (If yes, cite Law(s) & Regulations(s)) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent		
17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			18. Recommended Retention Permanent. Transfer periodically to the State Archives.		
19. Name and Title of Preparer Thomas W. Carter, Clerk-Treasurer		20. Telephone number 301-657-3211		21. Date October 26, 2006	

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 8 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title

Legislation

5. Earliest Year/Latest Year

1912 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Charter, charter amendments, ordinances and resolutions adopted by the Council with supporting and background documents, if any.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☒ Chronological
☐ Geographical
☐ Other (specify) _____

9. Volume

1.04 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

.01 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

- ☐ Daily ☒ Weekly ☐ Monthly

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

19. Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

12. File Becomes Inactive After

1 Number ☐ Month(s) ☒ Year(s)

14. Is Record Series Duplicated Elsewhere? ☐ Yes ☒ No
(If yes, specify agency or office)

16. Audit Requirements

- ☒ None ☐ State ☐ Federal ☐ Independent

18. Recommended Retention

Permanent. Transfer periodically to the State Archives.

21. Date

October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 9 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title

Town Code and Amendments

5. Earliest Year/Latest Year

1989 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

The Code, with amendments, contains the current local laws of the Town.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☐ Chronological
☐ Geographical
☒ Other (specify) Subject

9. Volume

.32 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

.018 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

- ☒ Daily ☐ Weekly ☐ Monthly

12. File Becomes Inactive After

5 ☐ Month(s) ☒ Year(s)
Number

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere?
(If yes, specify agency or office)

☐ Yes ☒ No

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements

☒ None ☐ State ☐ Federal ☐ Independent

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

18. Recommended Retention

Permanent. Transfer periodically to the State Archives.

19. Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

21. Date

October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 10 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title
Legal Opinions and Litigation.

5. Earliest Year/Latest Year
1956 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Written opinions rendered by the Town Attorney at the request of the mayor and litigations cases involving the Town.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☒ Chronological
☐ Geographical
☒ Other (specify) SUBJECT

9. Volume

172 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

1014 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

- ☐ Daily ☐ Weekly ☒ Monthly

12. File Becomes Inactive After

1 ☐ Month(s) ☒ Year(s)
Number

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere?
(If yes, specify agency or office)

- ☐ Yes ☒ No

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements

- ☒ None ☐ State ☐ Federal ☐ Independent

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

18. Recommended Retention

Permanent. Transfer periodically to the State Archives.

19. Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

21. Date

October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 11 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title
Town Publications

5. Earliest Year/Latest Year
1930 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.
Town Journal, handbook, directories and various notices to the press and general public regarding current events.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☒ Legal Size ☐ Computer Tape
☒ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☒ Chronological
☐ Geographical
☐ Other (specify) _____

9. Volume

11 cu. ft.
Number

File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

14 cu. ft.
Number

File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

☒ Daily ☐ Weekly ☐ Monthly

12. File Becomes Inactive After

1 ☐ Month(s) ☒ Year(s)
Number

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere?
(If yes, specify agency or office)

☐ Yes ☒ No

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements

☒ None ☐ State ☐ Federal ☐ Independent

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

18. Recommended Retention

Screen annually and destroy the material that is no longer needed for historical purposes. Retain historical information permanently and transfer periodically to State Archives.

19. Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

21. Date

October 26, 2006

<u>Instructions</u> - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD PO BOX 275 JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY PAGE <u>12</u> OF <u>15</u>
	Department/Agency Town of Somerset	2. Division Administration

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title Building Permits	5. Earliest Year/Latest Year 1900 to 2006
---	--

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Plans for residents and Town facilities.

Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input checked="" type="checkbox"/> Other (specify) <u>Blue Prints and Building Plans</u>	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input checked="" type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____	9. Volume <u>97 cu. ft.</u> Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) [Computer Tape(s) [Other (specify) [10. Annual Accumulation <u>.97 cu. ft.</u> Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) [Computer Tape(s) [Other (specify) [
11. File is Used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	12. File Becomes Inactive After <u>1</u> <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s) Number	
13. Current Location(s) (Bldg., Floor, Room) <u>Town Hall</u>	14. Is Record Series Duplicated Elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite Law(s) & Regulations(s))	16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention Permanent. Transfer periodically to the State Archives.	
19. Name and Title of Preparer Thomas W. Carter, Clerk-Treasurer	20. Telephone number 301-657-3211	21. Date October 26, 2006

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)	DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD PO BOX 275 JESSUP, MARYLAND 20794	AGENCY RECORDS INVENTORY
		PAGE <u>13</u> OF <u>15</u>
Department/Agency Town of Somerset	2. Division Administration	3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title Requests for Quotations/Invitations to Bid	5. Earliest Year/Latest Year <u>1993</u> to <u>2006</u>
---	--

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

This series contains the bid specifications, drawings, advertisements and other associated documents.

Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input checked="" type="checkbox"/> Other (specify) <u>subject</u>	9. Volume <u>.76 cu. ft.</u> Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>
		10. Annual Accumulation <u>.05 cu. ft.</u> Number File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>
11. File is Used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly	12. File Becomes Inactive After <u>5</u> Number <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)	
13. Current Location(s) (Bldg., Floor, Room) <u>Town Hall</u>	14. Is Record Series Duplicated Elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite Law(s) & Regulations(s))	16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent	
17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Recommended Retention Retain in office for five years after contract completion or until audit requirements have been met, then destroy.	
19. Name and Title of Preparer Thomas W. Carter, Clerk-Treasurer	20. Telephone number 301-657-3211	21. Date <u>October 26, 2006</u>

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 14 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title

Insurance (Property, Vehicle and Health)

5. Earliest Year/Latest Year

1988 to 2006

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Documentation and correspondence relating to insurance for property, vehicles and health coverage.

Record Series Format(s)

- ☒ Letter Size ☐ Microfilm
☐ Legal Size ☐ Computer Tape
☐ Bound Book ☐ Floppy Disk
☐ Audio Tape ☐ Video Tape
☐ Other (specify) _____

8. Record Series Sequence

- ☐ Alphabetical
☐ Numerical
☒ Chronological
☐ Geographical
☐ Other (specify) _____

9. Volume

.76 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

10. Annual Accumulation

.04 cu. ft.
Number

- File Drawer(s) ☒
Microfilm Reel(s) ☐
Computer Tape(s) ☐
Other (specify) ☐

11. File is Used

- ☐ Daily ☒ Weekly ☐ Monthly

12. File Becomes Inactive After

1 ☐ Month(s) ☒ Year(s)
Number

13. Current Location(s) (Bldg., Floor, Room)

Town Hall

14. Is Record Series Duplicated Elsewhere?
(If yes, specify agency or office)

- ☐ Yes ☒ No

15. Access Restrictions ☐ Yes ☒ No
(If yes, cite Law(s) & Regulations(s))

16. Audit Requirements

- ☒ None ☐ State ☐ Federal ☐ Independent

17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) ☐ Yes ☒ No

18. Recommended Retention

Screen annually and destroy material having no further legal, administrative, fiscal or operational value.

19. Name and Title of Preparer

Thomas W. Carter, Clerk-Treasurer

20. Telephone number

301-657-3211

21. Date

10/26/06

Instructions - Type or Print a separate form for each new or revised record series, forward with record Retention Schedule (DGS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
PO BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 15 OF 15

Department/Agency
Town of Somerset

2. Division
Administration

3. Unit

DEFINITION - RECORD SERIES - A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.

Record Series title

Insurance (Workers' Compensation)

5. Earliest Year/Latest Year

1979 to 2004

Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.

Workers' compensation Claims: contains incident reports, correspondence, medical reports, invoices and medical authorization forms.

See attached list of files.

Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____		9. Volume Number <u>.40 cu. ft.</u> File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>	
				10. Annual Accumulation Number <u>.014 cu. ft.</u> File Drawer(s) <input checked="" type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) <input type="checkbox"/>	
11. File is Used <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly			12. File Becomes Inactive After Number <u>5</u> <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)		
13. Current Location(s) (Bldg., Floor, Room) <u>Town Hall</u>			14. Is Record Series Duplicated Elsewhere? <input type="checkbox"/> Yes <input type="checkbox"/> No (If yes, specify agency or office)		
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite Law(s) & Regulations(s))			16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent		
17. Is an Index System Used? (If yes, explain briefly and describe any hardware/software.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			18. Recommended Retention Retain until termination plus three years, then destroy.		
19. Name and Title of Preparer Thomas W. Carter, Clerk-Treasurer		20. Telephone number 301-657-3211		21. Date October 26, 2006	